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ABSTRACT

This report describes two sets of training materials used in needs assessment and goal development programs. One set of materials trains local school/community groups to set goals for their schools. The second set trains evaluation specialists to assist the school community in the goal-setting process and emphasizes the technical skills related to data collection and use. The materials used by community groups consist of 10 units requiring a total of 16 hours or less to complete. The evaluation specialists' training materials are in 11 units requiring 20 hours total time. Both sets of materials are based on the goal development process which consists of problem identification by the school community, validation of these problems through school data and a community survey, translation of problems into goals, and an ordering of priorities. After a field test of the training materials, modifications were included with a training manual. Tape/slide presentations, simulations, and self-instructional exercises are employed in the programs. Three tables of data are presented in the report. (BRB)

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Final Report

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A SEMINAR AND TRAINING PROGRAM IN NEEDS ASSESSMENT AND GOAL DEVELOPMENT

August 1973

U.S. DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE

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Introduction

The process of making decisions about the direction and quality of educational change has received increased attention in recent years. Two recent trends toward improving educational decision-making have been the increased community involvement at the local school level and the application of systematic procedures to the development and evaluation of educational innovations. The project which is reported on here focused on bringing these two trends together in the production of training materials in needs assessment and goal development for local school-community groups and for professional evaluation specialists.

Three years ago, the Department of Research and Development (then, the Department of Program Research and Design) of the Cincinnati Public Schools began a Title III project focused on developing and testing a model program for increasing community involvement at the local school level. Centered in a high school district with two junior high schools and eleven elementary schools, the program employed paraprofessional aides to organize and facilitate the functioning of local School Community Associations (SCA). These Associations were to have representation from the entire school community - teachers, school parents, students, school administrators, non-school parents, local businessmen, and other interested community residents. The SCA was seen primarily as a goal-setting body for the local school although it could also follow through on program planning and implementation depending on the resources it had available.

After this project had been underway a year, a need was seen for training the paraprofessional aides and leaders of the local SCAs in needs assessment

and goal setting skills. A proposal was submitted to the National Institute of Education (then, the National Center for Educational Research and Development) to fund the development, testing and production of training materials in these skills.

A need was also seen for training professional evaluation specialists to work with the local school community persons in setting the goals. The evaluation training would be complementary to that of the community persons in that it would cover many of the same goal-setting skills but treat certain technical skills, e.g. use of data, sampling, surveying, on a more sophisticated level. Thus, evaluators would be trained to assist local school groups in setting goals while the community persons would be trained in conducting the goal setting process itself.

Two training "packages", or sets of training materials, were to be produced in this project. The first package would be a self-contained training program with all necessary materials for training local school-community groups in goal setting skills in a series of periodic meetings. The second package, also a self-contained set of materials, could be used for training evaluation specialists in many of the same skills while treating certain technical areas more deeply. This training program could be done in weekly "seminar" meetings or on a workshop basis. Accompanying the materials would be complete directions for conducting either training program.

The scope of the content of the training materials was to be limited to skills in identifying needs and problems of the school and setting goals for the school community to pursue. This was seen as the first step in a model

for local school program development developed in the Department of Research and Development of the Cincinnati Public Schools. Once a school community has set its goals, it would then plan programs to meet the goals, implement the programs, and evaluate them. The last three steps in this four step cycle would require different skills with additional training for both community and evaluation persons.

Procedures

Original plans for beginning the project called for the project coordinator to work with an intern from the Ohio State Model Training Program in evaluation on developing the content and format of the training materials. This idea was abandoned, however, when the intern took another position. Instead, it was decided to conduct a ten-week seminar in which local evaluation specialists could participate to identify resources and develop content for the materials. The seminar was successful in producing a "working" content outline for the training materials.

During this time, meetings were held between the project coordinator and the staff of the Title III project in community involvement, including the paraprofessional aides in the project who were to serve as the pilot-test group for the community training materials. Additional ideas for the materials were obtained in these meetings.

The model for goal-setting which was developed in the seminar and meetings differed from the traditional discrepancy model of needs assessment. In that model, goals are identified first, or a given set of goals are endorsed and these goals are reduced to objectives. Measures are taken on each objective and the discrepancy between the actual and desired situations defines a "need."

Because the training materials in this project were to be oriented toward community use at the "grass-roots" level, it was felt that a model addressed to the initial identification of the felt needs, problems, and issues of concern to community people would be more appropriate. It was believed that people would be better able to give voice to the concerns and problems which

they are aware of, than to identify or endorse a set of goals which may or may not reflect their concerns.

Using this starting point, resources and approaches were sought or developed which would build up from the identification of school problems to the setting of goals. The following model was developed:

1. Problem Identification - initial identification of problems, needs, or issues in representative school-community groups

2. Problem Analysis and Clarification - seeking the causes of problems and stating problems in clear language.

3. Problem Validation - via:
   a. Objective data - examining school data, such as test scores, to verify the seriousness of the problem.

   b. Community survey - seeking confirmation of the problems identified by community representatives through a community survey.

   c. Problems may also be identified in data or surveys and cross-validated by the other.

4. Translating Problems to Goals - stating problems in goal language indicating the desired direction of change.

5. Placing Goals in Order of Priority - ranking goals in terms of certain criteria.

6. Taking Action on Goals - reducing goals to objectives and initiating plans to reach the goals.

Because the development of ideas and materials took longer than was anticipated, it was decided to go ahead with producing a pilot-test version of the community package and pilot test it with the SCA paraprofessional aides in the fall of 1972. The results of this pilot-test would then be incorporated into the pilot-test version of the evaluator package along with the continued development of it, and that package would be piloted in the beginning of 1973.

Revisions and refinements of both sets of materials based on these tests were incorporated into the field-test versions of the materials which were tested in summer of 1973. Final revision and production of the materials was then accomplished.

All the school-community aides who participated in the pilot test of the community training package were women; six were black and ten were white. In the pilot-test, eight units of about $2\frac{1}{2}$ hours each were conducted on a weekly basis. The training units consisted of a variety of reading passages, group simulations, slide/tape presentations, and self-evaluation exercises. At the end of each unit, a content and process evaluation was conducted.

The content evaluation was usually a paper-and-pencil exercise which was collected, scored, and returned to the trainees with a brief discussion the following week. The trainees felt that this form of evaluation, while serving the purposes of the developer, was less meaningful for them than the self-evaluation exercises built into the materials. In subsequent versions of the materials, this type of evaluation system, with immediate feedback available to the trainees was used in the materials. By having the trainer closely monitor the performance of the trainees in these individual and group exercises, adequate feedback would be available to the trainer.

The process evaluation form completed by each trainee at the close of each unit was another method of formative evaluation for the developer. A sample of the form is in Appendix A. Modifications of this form were used in all the pilot and field tests. On this form, trainees were asked to rate different aspects of the training unit, such as clarity, length, and sequence, as well as points specific to the unit. They were also asked to

give comments for improving the content of the unit or its method of presentation. The results of these formative evaluation efforts are described in the Results section of this report.

The pilot-test of the evaluator training program was begun in January 1973. This program was done in a ten-meeting seminar format once a week. The participants in this pilot-test included four project evaluators, six educational administrators seeking goal-setting skills, one paraprofessional aide, and three women from local school community associations who sat in on the training because they were interested in using the community training materials with their local school groups. Eight of the fourteen participants were women and five were black. Again, these trainees completed formative evaluation forms on each unit.

With completion of the pilot-test set of materials, arrangements were made to have them reviewed by experts in the field for suggestions on both content and format of the materials. Dr. John Sanders, then at Ohio State University, now at the Appalachian Educational Lab, reviewed both packages and provided many helpful comments. Dr. Darrell K. Root of the Ohio Center for Evaluation reviewed the evaluation materials and also provided suggestions. Mr. Paul Brown, of the Urban League, has been active in school-community relations in Cincinnati, and reviewed the materials from that viewpoint. Ms. Joan Nicholas and Ms. Barbara Fritz who directed the Title III community involvement project, worked closely with the developer in developing and revising the materials. Ms. Sandy Hobson, who served as evaluator of the Title III project, assisted the developer in writing the initial set of materials, and gave ideas for revision later on.

Results of the formative evaluation were incorporated into the field test versions of the packages. The community training package was first field-tested with a group of eight lay persons from Kilgour School in Cincinnati who are organizing a school-community organization in their school district. Results of this field-test are in the next section. The community materials were also tested in a two-day workshop at Florida A&M with a group of 30 education professionals from throughout Florida. Originally, it was planned to test the evaluator materials at Florida A&M with those persons in the workshop who had the prerequisite level of skills. But after the Entrance Skills Inventory was administered to the workshop participants, it was decided to have all of them take the community package.

The evaluator training program was field-tested with a group of 25 vocational counselors from the Cincinnati area in a five-day workshop. This group was seen as an appropriate test group because they had the necessary technical background in statistics and tests and measurements, and because they were to engage in planning vocational education programs based on a needs assessment in their school districts. Formative evaluation was conducted on all these field tests and the materials were revised prior to final production.

The slide/tape presentations and graphic design work used in the materials were produced by the University Media Services of the University of Cincinnati. The content of the slide/tape presentations was written by the developer and the accompanying visuals were developed jointly by the developer and media specialist.

Accompanying each training package is a Trainer's Manual which gives complete instructions for conducting the training program. This manual was also tested in the Florida A&M and Cincinnati vocational counselors' workshop

and necessary revisions were made in it. The Trainer's Manual enables anyone with the requisite background (given in the Manual) to conduct the training program.

The availability of the training program will be disseminated in a number of ways. The first section of the Trainer's Manual contains complete information about the program to enable someone to decide if the program would meet their needs. This section can be sent out separately from the actual training unit instructions which form the second section of the Trainer's Manual.

The slide/tape presentation in the second unit of the program can also be "taken out of context" and shown to interested community groups to give an overview of the program. This will be done locally in Cincinnati but the presentation may also be sent out to publicize the program.

A descriptive abstract of the program will be sent to various school districts, universities, and other education agencies publicizing the availability of the materials. Cost of purchasing the materials will be determined and made available to those interested.

Results

Formative Evaluation. In the pilot tests of the community and evaluator's training materials, the trainees were asked to fill out forms at the end of each training unit. These forms contained scales on which the trainees were to rate various aspects of the unit and spaces to write in their comments for improving the content and format of the training.

In analyzing the ratings and comments of the trainees in the community pilot-test, it was found that the two units which dealt with problem validation caused the most difficulty. One unit covered the use of objective school data to validate and identify problems while the other showed how to construct, administer, and analyze the results of a community survey for the same purposes.

This content was presented in each unit by means of a slide/tape presentation interrupted by five exercises applying the content. A separate paper-and-pencil test of the content was given at the end. While the trainees felt that the content was interesting and helpful, they tended to rate the presentations as too long and yet needing more treatment. Discussion with some of the trainees indicated this should be interpreted to mean that too much content was being given in the amount of time available.

In revising these units for field-testing, the unit on objective data was condensed somewhat, and more emphasis was placed on an overview and understanding of the kinds of school data available. The application exercises were simplified somewhat and immediate feedback was given after each exercise.

The unit on community surveys was divided into two parts - the first on construction and administration of a survey and the second on use of the survey results in problem identification and validation. The exercises were also simplified with more emphasis on understanding through the use of immediate feedback of results.

The other unit which caused problems was that on translating validated problems to goals. Material was included on the derivation of objectives from the goals. This material caused some confusion for the trainees and it was decided that it was more appropriate content for the evaluator package.

These results on the process evaluation were confirmed by the results of the content evaluation given at the end of each unit. On these forms, trainees were given questions based on the content of the unit. The pilot-test trainees had the most difficulty with the content of the units on objective data and community survey. The content evaluation also indicated that the trainees did not get a clear overview in the first unit of the model for goal-setting on which the training program is based. This unit was totally revised in subsequent versions of the materials.

A similar situation occured in the pilot-testing of the first version of the evaluator training materials. Two new units were placed at the beginning of the training program. The first was on models of evaluation and the role of community values in goal-setting. The second unit reviewed models for goal-setting and community involvement. Neither of these units was well received by the trainees. On both their process evaluations and in discussions, they indicated that the material seemed too abstract, was not well-integrated, and did not satisfy their desire to get into learning specific skills. The content evaluations were also not integrated into the materials and were frequently seen as a "tacked-on" evaluation activity.

In revising the evaluator materials, the content on evaluation and goal-setting models was treated as an optional section which the trainer could include at his discretion. The content on community values and community involvement was put into a new first unit. The second unit in both the community and evaluator programs is devoted to an overview of the training program and the model for goal-setting.

The Entrance and Exit Skills Inventories were employed for the first time in this pilot-test as a pre-post self-evaluation of the trainees' acquisition of the skills. The results confirmed that the trainees gained little from the first two units. Substantial gains were made in subsequent units, however, according to the trainee's self-ratings on the Inventories.

Based on these evaluations of the pilot-test, some new units were written, others were rewritten, and others required only minor changes. Since the first field test of the community materials involved only a small number of persons, the developer asked for verbal comments and suggestions after each unit. There were no substantive changes to be made based on this feedback but some of the reading passages and exercises were re-written to make them clearer.

Formative evaluation forms were filled out for each unit by the trainees in the other two field tests of the community and evaluator training materials. Ratings of the trainees were quite favorable for all the units. Additional comments were given for improving parts of some units and these were incorporated into the final version of the materials as appropriate.

Summative Evaluation

Summative evaluation was addressed to determining whether the training materials accomplished the purposes for which they were developed. The general purpose of the materials was to provide trainees with skills in setting goals for local schools. This general purpose was translated into performance objectives for the pilot-tests of the community and evaluator training materials. The objectives for each unit were stated at the beginning of the unit and the objectives were evaluated by means of paper-and-pencil "tests" which were administered at the end of the unit. These were collected by the developer, scored and returned to the trainees with discussion before beginning the next unit.

As stated previously this system of evaluation served the purposes of the developer well, at that stage in the development of the materials, in determining how well the objectives of the training were achieved. However, the trainees expressed concern that this type of evaluation was not very meaningful to them. So, in the field-test version of the materials, it was decided to use a system of evaluation exercises giving immediate feedback to the trainees. The performance of the trainees in the exercises would be monitored by the trainer using discussion outlines given in the trainer's manual. In this way the trainer could bring out points in the discussion which the trainees may have missed themselves.

In addition, a pre-post evaluation measure was developed to provide an over-all evaluation of their goal-setting skills acquisition to the trainees and to the trainer. The Entrance and Exit Skills Inventories allowed the trainees to rate themselves on the objectives of the program at the beginning and end of training. The results show the trainees where they have made progress and where they still need work. They can then review those units

in their materials and also investigate the topics further in the references given at the end of the units.

A summary of the results of the Entrance and Exit Skills Inventories for the field tests of the community and evaluator training materials is given in Tables 1 and 2 as evidence of the attainment of the objectives of the training programs.

Table 1 ENTRANCE/EXIT SKILLS INVENTORY RESULTS
COMMUNITY TRAINING PROGRAM FIELD TEST

N=29

Skills	Frequency Distribution: Entrance Skills Ratings* 1	2	3	4	5	Exit Skills Ratings 1	2	3	4	5
1. Describe a process for setting goals for a local school	2	9	9	7	2	0	0	5	19	5
2. Conduct a small group in the identification of school needs and problems.	1	8	9	7	4	0	0	5	14	10
3. Assist a group in analyzing and clarifying problems it has identified.	0	7	16	4	2	0	0	4	17	8
4. Explain the types of objective school data to a school-community group.	1	12	9	4	3	0	0	4	17	7
5. Show how to identify and validate problems with objective school data.	4	11	11	4	0	0	0	7	14	8
6. Describe the steps involved in constructing and administering a survey of the school community.	7	10	10	1	1	0	1	3	20	4
7. Show how to identify and validate school problems with the results of a community survey.	5	10	10	2	1	0	0	4	14	9
8. Translate a problem statement to a goal statement	2	9	11	3	4	0	0	1	13	15
9. Describe a procedure for ranking a list of school goals in order of priority	2	7	12	6	2	0	1	3	12	13
10. Lead a group in seeking consensus on goal priorities	1	10	9	7	2	0	1	4	12	11

*Rating Code

1. I have no idea how to do this.
2. I could take a try at this.
3. I could do this with help.
4. I could do this quite well but am not an expert.
5. I would feel completely capable of doing this.

The results of the field test of the community training program indicate that the trainees felt much more confident of their ability to perform the skills at the end of the training program. Particularly favorable was the improvement in the ratings of those skills having to do with the use of objective data and community surveys. The results of the evaluator trainee ratings in Table 2 show a similar pattern of improvement from pre to post rating.

An attempt was made to survey the participants in the pilot-test of the community materials to determine the extent to which they had applied their goal-setting skills during the previous nine months. Some of the aides had left the program or were away on summer vacation so that only four surveys were returned by the time this report was written. The results of the survey are summarized in Table 3.

Table 2 ENTRANCE/EXIT SKILLS INVENTORY RESULTS
EVALUATOR TRAINING PROGRAM FIELD TEST

N=21

Skills	Frequency Distribution: Entrance Skills Ratings* 1	2	3	4	5	Exit Skills Ratings 1	2	3	4	5
1. Describe a process for setting goals for a local school.	6	5	4	5	1	0	0	6	12	3
2. Conduct a small group in the identification of school needs and problems.	2	7	3	5	4	0	0	5	9	7
3. Assist a group in analyzing and clarifying problems it has identified.	1	10	2	6	2	0	0	2	13	6
4. Explain the types of objective school data to a school-community group.	1	8	7	4	1	0	0	6	9	6
5. Show how to identify and validate problems with objective school data.	2	11	3	3	2	0	1	4	12	4
6. Describe the steps involved in constructing and administering a survey of the school community.	4	9	6	1	1	0	0	10	3	8
7. Show how to identify and validate school problems with the results of a community survey.	2	8	7	3	1	0	0	4	14	3
8. Translate a problem statement to a goal statement.	2	6	6	6	1	0	0	2	8	11
9. Describe a procedure for ranking a list of school goals in order of priority.	0	12	6	3	0	0	0	5	9	7
10. Lead a group in seeking consensus on goal priorities.	2	8	5	1	5	0	0	3	12	6

*Rating Code

1. I have no idea how to do this.
2. I could take a try at this.
3. I could do this with help.
4. I could do this quite well but am not an expert.
5. I would feel completely capable of doing this.

Table 3 RESULTS OF FOLLOW-UP SURVEY OF SCHOOL-COMMUNITY AIDES

Skills	Average Rating on a Four-Point Scale*		
	Confidence	Use	Value
1. Describe the steps in the goal-setting process.	3.5	3.3	4
2. Lead a group in problem identification.	3.8	3.2	3.8
3. Clarify a list of identified problems.	3.0	2.5	3.5
4. Identify school problems using school data.	3.5	2.8	3.8
5. Validate school problems using school data.	3.5	2.3	3.5
6. Describe (or do) the steps involved in constructing and administering a community survey.	3.0	2.0	3.0
7. Explain the results of a survey.	3.0	2.3	3.5
8. Translate problem statements to goal statements.	3.3	2.8	3.5
9. Assist a group in placing school goals in priority order.	3.5	2.5	3.5

*1=low, 4=high

The ratings shown in Table 3 indicate that the trainees felt the skills were of value and that they had good confidence in using them. The "Use" criterion, while lower, reflects the fact that many of the skills would not be used more than once in the goal-setting process. (For the "Use" criterion, 1=Never used the skill, 2=Used the skill once, 3=Used the skill 2 to 3 times, 4=Used the skill often.)

To illustrate an application of the goal-setting skills, a summary of the needs assessment activity at her school was submitted by one of the participants in the community training pilot test. (See Appendix B.) The summary report indicates that the School-Community Association Aide adapted the goal-setting process to her local school situation but followed the main steps of problem identification and clarification, problem validation, translation to goals, and planning programs to meet the goals.

These summative evaluation efforts provide evidence that the materials do accomplish the purposes for which they were developed. Participants in the pilot and field tests acquire the skills, make use of them, and find them valuable.

Conclusions

The previous sections have described the development of the two training packages in local school goal-setting skills, and the efforts to conduct formative and summative evaluation of the products. Thus, the objectives of the project were accomplished. However, the fact that the initial period of development in the project took much longer than anticipated meant that time was very short for many of the activities in the second part of the project. Revision of the materials and arrangements for field tests were affected to some extent by the need to make up lost time.

While the developer had the necessary evaluation background to formulate the content of the materials, his lack of experience in the production of such materials meant that much "trial-and-error" learning occurred over the course of the project. For example, a special type face was used to print the pilot-test copy of the community training materials. This is now seen as being unnecessary at that point and it consumed valuable time.

Although one always feels that more could be done with the materials to improve them, it is believed that the two sets of training materials, as they now stand, represent a valid and useful tool for the training of lay and professional persons interested in improving the quality of education in their community.

APPENDIX A

UNIT I

UNIT EVALUATION FORM

Please use this form to evaluate the Unit you have just completed. Indicate your opinion of each item by circling one of the numbers following the item according to the following codes:

1=Poor 2=Pair 3=Good 4=Very Good 5=Excellent

a. Printed reading material was clear and understandable.

1 2 3 4 5

b. Unit content was treated in sufficient length and detail.

1 2 3 4 5

c. Unit content was presented in a logical sequence.

1 2 3 4 5

d. Script of tape/slide presentation was clear and understandable.

1 2 3 4 5

e. Slides illustrated script-text well.

1 2 3 4 5

f. Exercises were helpful in clarifying Unit content.

1 2 3 4 5

g. Exercises were helpful in learning to apply Unit content.

1 2 3 4 5

h. Amount which you learned from this Unit.

1 2 3 4 5

Please list any suggestions you have for improving this Unit or its method of presentation.

_____

_____

_____

_____

APPENDIX B

CARTHAGE SCA

NEEDS ASSESSMENT ACTIVITIES

(1972-73)

Date	Activity	Persons/Groups Involved
11-2-72	Problem identification	SCA Steering Committee (13)
12-27-72	Synthesis of problem lists	Sub-committee of SCA Steering Committee (3)
1-4-73	Problem clarification: (1) Lack of reading skills (2) Limited growth in inter cultural/ racial understanding (3) Need for increased community interest, participation, and commitment toward school-community activities (4) Poor class attendance (5) Need to develop student's physical and social skills	SCA Steering Committee (9)
2-12-73	Teacher Survey re. problems identified by SCA	Carthage School faculty (13)
3-9-73	In-service Day (clarification and validation of SCA identified problems)	Carthage School faculty (10)
3-19-73	Status of on-going and planned programs: are they meeting the identified needs?	SCA meeting (27)
4-12-73	SCA Program Goal Dissemination (report card inserts) Goal 1: To increase reading skills Program: Summer Reading Goal 2: To provide learning experiences outside of the regular classroom Program: Outdoor Education Goal 3: To provide school facilities for community use Program: Lighted-school	Parents of Carthage School students (300)
4-12-73	School-community meeting (Dissemination of SCA needs assessment activities. Identification of needs to plan Local School Option programs)	SCA, PTA, School staff, other parents and community persons (33)